DOCUMENT RESUME

ED 414 140 RC 021 286

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TITLE The P.A.G.E. Team Alignment Process.
PUB DATE 1997-11-00
NOTE 12p.; In: Deeply Rooted, Branching Out, 1972-1997. Annual AEE International Conference Proceedings; see RC 021 269. P.A.G.E. is a registered trademark.
PUB TYPE Reports - Descriptive (141) -- Speeches/Meeting Papers (150)
EDRS PRICE MF01/PC01 Plus Postage.
DESCRIPTORS *Adult Education; Andragogy; *Corporate Education; *Experiential Learning; *Group Dynamics; Inservice Education; Management Teams; Organizational Development; *Team Training; Teamwork; Transfer of Training

ABSTRACT

This paper describes a process by which developing or established teams can create a clear and common understanding of issues concerning team purpose, team approach, performance goals, role clarity, and mutual accountability. The major components of this process--Purpose, Approach, Goals, and Everyone mutually accountable--form the acronym P.A.G.E. Without a clear understanding of these four aspects, a team will never reach a level of high performance. The P.A.G.E. process is taught primarily to adults in business situations. The four stages of development for teams are forming, storming, norming, and performing. The P.A.G.E. process is most useful for teams that are in the formative stages of development because it helps accelerate teams through the forming, storming, and norming stages and avoids leaving team development to chance. "Nitro Crossing" is an experiential, interactive exercise used to familiarize team members with the principles of the technique. All members of the group participate in identifying the components of the task ahead of them and putting them onto a one-page outline. The concepts of continuous improvement are applied to the group process rather than to business processes because American business is less process oriented than task oriented, and a team that has taken care of internal business can place more emphasis on satisfying customer needs. Contains 13 references and a sample P.A.G.E. outline sheet. (TD)

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The P.A.G.E.® Team Alignment Process

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ED 414 140

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ABSTRACT

This workshop demonstrates a process by which teams can effectively create a clear and common understanding of issues concerning team purpose, team approach, performance goals, role clarity, and mutual accountability for developing and/or established teams. As a result, teams utilizing the P.A.G.E.® Team Alignment technique quickly move through the developmental process toward high levels of performance while limiting the time spent in the chaos or "storming" phase of development. The process utilizes tools and techniques which are easily taught, learned, and applied to project teams, work committees, functional work groups, and executive leadership teams alike. The process, based upon full group participation, is experiential in nature as it applies "chaos management tools" to create teams that effectively work off of the same page.

Most of us have experienced teams which are troubled, struggling to understand the different roles its members are to fulfill. These teams often waste precious time wondering if they have all come for the same purpose, wondering why their expectations of the others in the team go unmet, wondering if the others are even aware of these expectations. To move beyond the point where a collection of individuals has the potential to be a team that gets the desired results, all teams must shape their own common purpose, performance goals, and approach (Katzenbach & Smith, 1993). In fact, if one reviews the definition of a "real team" as defined by Katzenbach and Smith, they would find the following: "A small number of people with complementary skills who are equally committed to a common purpose, performance goals, and working approach for which

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they hold themselves mutually accountable." When examined, the major components of process in this definition appear to be Purpose, Approach, Goals, and Everyone mutually accountable — hence, the acronym P.A.G.E.[2].

The author's experience over the past 12 years has witnessed the theme that teams which do not have a clear understanding of what is expected of them with respect to these four aspects (its members not on the same page, if you will) never reach a level of high performance. In fact, many of these teams fail to remain intact at all. While this author will agree with those who would say that there is much more to developing high-performing teams than simply agreeing upon these core issues, it is highly unlikely that to reach clarity and shared meaning on these basic building blocks will be able to move beyond the "storming" stage.

Tuckman and Jensen (1977) outlined their stages of development for small groups which witness teams moving through "forming," "storming," "norming," and "performing." Although teams which are working well ("performing") and seeking additional opportunities to refocus energies to increase effectiveness can benefit greatly from the process, the P.A.G.E.[2] Alignment Process is most useful for teams that are in the formative stages of development. This is because it is unwise to simply leave a team development to chance and utilize the team alignment process solely as a last resort. For instance, negative relationships in dysfunctional teams can often disintegrate to the point to where they are beyond repair. Yet many American businesses have a tendency to adopt a reactive response to team development rather than shape effective team processes before, or even concurrent with, latching onto the task ahead of them. Therefore, we have found it to be a most prudent and wise investment of time for

a team to accelerate their movement through "formin g," "storming," and "norming" through practicing the alignment approach.

Effective teams must get all members to work in concert with one another. This can be done by putting egos aside and understanding each individual's role in the team and how that role best serves the common purpose for which they have come together. The P.A.G.E.² Process provides the opportunity to get expectations, assumptions, and hidden agendas out in the open, thus eliminating most of the potential conflicts which stem from poor management of the team process. It is certain that teams will still deal with the personality issues which come with any group of individuals striving to create a future. Each team creating this foundation will, however, be better able to cope proactively with latecomers to meetings and those who refuse to complete assigned tasks on time.

The first step in the aligning the team's effort resides in ensuring that the members know exactly why they are here. How do I fit in the group? This issue of Purpose must be dealt with quickly or members have no reason to stay on with the team and put work into further development. Defining a common Approach will then begin to address issues which include customer specifications, company boundaries and barriers, and norms for dealing with one another. This Approach should be seen as dynamic and evolutionary. Adopting such a mind set will result in a flexible approach and responsiveness to needs both within and external to the team.

Developing the necessary Goals and deliverables which the team must achieve on route to fulfilling the purpose is the next step in aligning the efforts of the team members. And finally, each team must capture clarity around how the group creates an environment in which Everyone is mutually accountable for the group process and its result. This simply means that it is everyone's job to ensure quality. If one member simply runs out of time or energy to complete their as-

signed work, the others must be able to get the work done and ensure the desired results are achieved. The statement, "That's not my job," is extremely dangerous to stable team operations. Your competitor found a way to deal with absent members or vacation time, so must you!

Yes, communication is a key aspect for high performance, as are technical expertise and effective use of resources. They must, however, be grounded in a solid foundation for understanding the four key aspects we have defined as Purpose, Approach, performance Goals, and creating mutual accountability for Everyone. Sample questions which can be addressed as the group proceeds through the process include:

Purpose (Why are we here?)

Why were we brought together?
What are we to accomplish?
What is the final result we seek?
What image displays a perfect end?
What legacy do we want to leave as a team?

Approach (How are we going to operate?)

What are the boundaries and givens in our project/task?
What are our basic operating principles?
How will we fill our roles as Leader? Champion? Facilitator? Recorder?
How will we:
Make decisions? Deal with conflict and disagreement?
Define our values? Set an example for others?
Handle meetings? Share information?

Goals (What specific benchmarks are we shooting for?)

What deliverables will we produce?
What are the time frames we must meet?
Which items must come first?
What are other priorities in achieving these goals?
How will we measure our effectiveness?
How will we know this is what the customer ordered?

Everyone mutually accountable (How do we make sure we don't let others fail?)

How will we help others meet their objectives?
How will we manage our boundaries?
How can our systems support what we are attempting to achieve?
How will we provide backup to one another?

It is important to note that it's not necessary to discuss each and every question in a laborious fashion. These questions are simply guidelines with which to structure the group's focus and reinforce their collective image of why they are here, how they will approach the task as a team, what the steps are in accomplishing the results, and how they will overcome individual difficulties that could undermine the team's effectiveness. It is necessary, though, for the team to go through the struggle of creating this P.A.G.E.® off of which they will base their work. This struggle provides the ownership and commitment that are necessary for attaining high performance. Without the struggle, the risk is run that the team may only be going through the motions.

The approach to the P.A.G.E.® Process is experiential and interactive. This means, of course, that the work combines elements of "doing," "reflecting," "connecting," and "applying" learning to the real-life issue the team is working to address (Kolb, 1971). As most of our work is with adult, and more specifically, corporate, populations, we find that an approach which builds upon the principles of andragogy is most appropriate.

Andragogy assumes that, as a person matures, he or she: a) is more self-directed; b) accumulates more experiences upon which learning is built; c) becomes more oriented to the developmental tasks of social roles; and, d) changes perspective from postponed application of theory to immediate application to solve problems. Therefore, using this process to address a "case study" may work well in learning how to use the P.A.G.E.® Process as a tool, but the real value will come in addressing a real-life issue which is pressing for the team.

To bridge this gap, we utilize experiential exercises such as the "Nitro Crossing" (Rohnke, 1983) to apply the principles of the technique to get familiar with the P.A.G.E.® Process as a tool, and then move back into direct application regarding the team's specific business issues. For instance, in using the exercise "Nitro Crossing," the various rules, constraints, and other information pertinent to conducting the exercise are placed upon small cards, one per card, and then dispersed among the group members. A small "whiteboard" is given to the group so that they may arrange all of the information according to a category. The categories are the Purpose, Approach, Goals, and Everyone mutually accountable. Any card that speaks to the purpose of the exercise will be placed in the Purpose column. All cards that deal with the Approach the group must take in conducting the exercise from a safety perspective (e.g., each person must keep head above feet at all times) will be placed in the column under the heading Approach. This continues until all cards have been placed in the most appropriate column.

The group has now identified for itself the entire picture of what lies ahead in the task before them. There is much work to be done to assess who can actually carry water over the ravine and how they deal with the last person to leave the starting side. However, the group now has full participation in the process and any member can quickly refer to the P.A.G.E.® outline just created to

remind all members of the "customer requirements," "legal barriers," or established decision-making techniques.

Following the debriefing and transfer of learning to the work setting, a variety of Quality, or continuous improvement-based tools are then utilized in applying the process to a key business issue. Some of these tools include "Brainstorming," "Brainwriting," "Affinity Diagrams," "Interrelationship Diagrams," "Fishbone Diagrams," "Multivoting," and "Radar Charts" (see Brassard, 1985). When applied to team development issues rather than production or manufacturing issues, these techniques are often referred to as "Chaos Management Tools." We have found it somewhat unique to apply the concepts of continuous improvement to group process rather than "business" processes. However, we believe that the quality of goods and services cannot exceed the ability of the team to "perform" on a consistent basis.

This interactive, facilitated approach to addressing operational issues and acknowledging assumptions is then followed throughout each phase of the process. Often, we have found that the most difficult portions for a team to complete effectively following the P.A.G.E.® model are the Approach and Everyone Mutually Accountable. Why is this the case? The most prolific hypothesis here is that these two areas are more process oriented and most groups in American business tend to focus more on the task (i.e., Why are we here and what do we do?), but are less comfortable in looking at group process issues like dealing with conflict and holding one another accountable. The group, after reaching agreement or consensus on the issues, can then capture the final result of the process on a one-page document to which the members can refer as they proceed in fulfilling the task ahead of them (see Figure 1).

Posting the agreed items on a single sheet in the aforementioned fashion has numerous benefits. First, it provides a disciplined framework for the team

members to not only learn the P.A.G.E.^{2} tool, but to serve as a reminder of what it is that they are here to accomplish each time they work as a group. Secondly, it has been our experience that revisiting this P.A.G.E.^{2} at the beginning and end of each meeting is a positive reinforcement to the group's collective approach. Third, it provides a basis upon which the team can place the customers' primary concerns and desires next to the given boundaries and constraints which are present, but not always acknowledged in any team process.

It is the author's hope that the P.A.G.E.^{2} Team Alignment Process can continue to serve teams in taking care of their internal business so that they may then place more emphasis on satisfying customer needs. After all, if some type of customer didn't request this, why are we spending time working on it anyway?

Purpose, Approach, Goals, Everyone accountable Model for Team Alignment - OVERVIEW

Purpose	Approach	Goals	Everyone accountable
•What we need to achieve: the reason for coming together. •Will often include an image of the ideal outcome.	•Our qualitative agreements for operating as a collective unit. •Process issues surrounding how we will communicate, make decisions, treat one another, and deal with disagreement. •Customers -Direct -Indirect •Boundaries that provide reality checks and balance.	•A quantitative target of progress toward achieving the purpose; in a specific time frame. •Team success measures •Deliverables (products) •Usually consists of benchmarks against which we can measure our progress toward satisfying the purpose.	•Basis for creating backups and reinforcing systems for success. •Best if specific as to how we will uphold accountability and duty completion. •Meeting facilitation •Leader responsibilities •Documentation/recording •Championing •Addresses how we deal with gray areas and how we cover for one another when necessary.

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Figure 1. The P.A.G.E.® Outline Sheet. Summary Overview.

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(Editor's Note: The author did not provide complete references. Please contact him for more information.)